



AIM New Users Guide

Fall 2015

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NAVIGATION BASICS

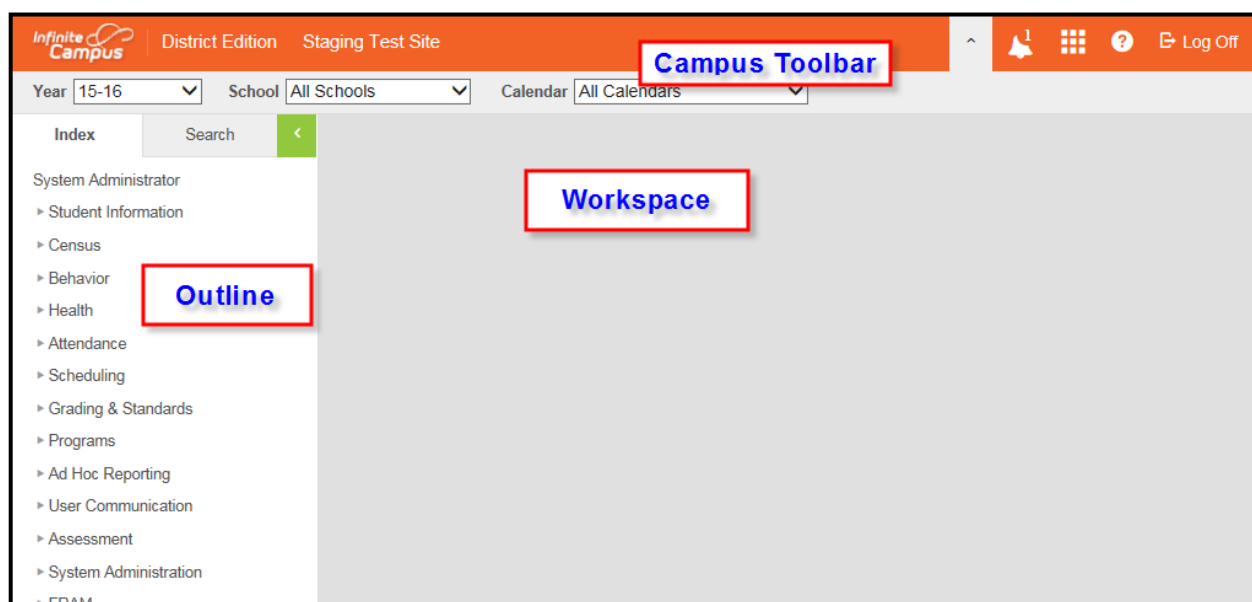


AIM MT Edition is a web-based application. A secure user name and password are required to log-in and use the system. The user name and password are supplied and maintained by your District's System Administrator.

To access the AIM MT Edition:

1. Open a web browser
2. Enter the district's URL
3. Enter the user name and password


The Infinite Campus application is divided into three parts, the **Campus Toolbar**, the **Outline** and the **Workspace**.

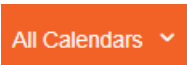








CAMPUS TOOLBAR

The Campus Toolbar is the area that defines the Year and Calendar. To find a student, the correct Year and Calendar must be selected. The tools on far right end of the toolbar provide quick access to:

 Hide or See Calendars;  See your notifications;

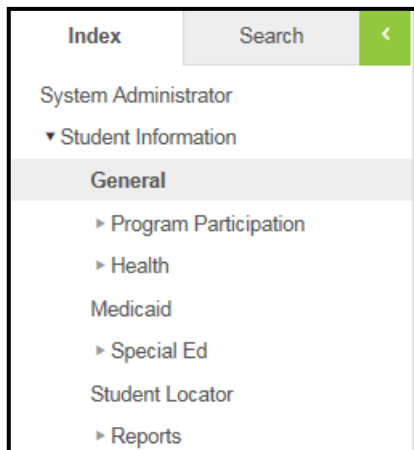
 Switch between applications or go to Campus Community.

     and  To get or search for help.

 Campus Instruction  Campus Community

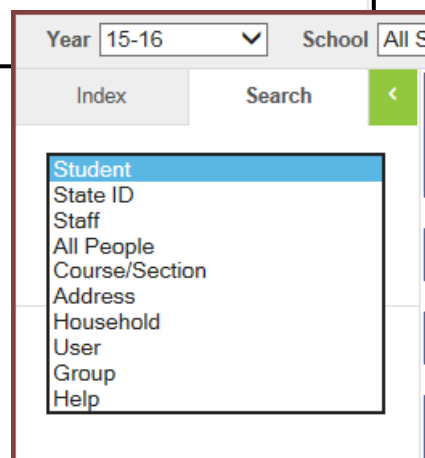
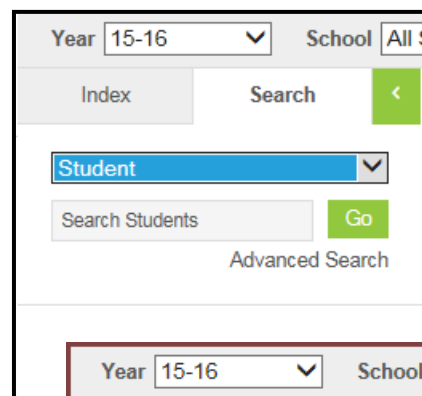
OUTLINE

The Outline is composed of two tabs: Index and Search.



The Index tab is divided into modules. Modules are groups of similar tools. The Student Information module, for example, contains tools that help find information about students (General, Student Locator, Reports). To expand any module, click on the arrow (▼) sign. To select a tool, click on the tool name.

The Search tab allows the user to search for different types of information in Campus. The types of searches available to a user depend on the rights given by the System Administrator. To search, select a search type and enter search criteria in the box.



WORKSPACE

The Workspace contains the specific record or tool that is being used.

SEARCHING IN CAMPUS



There are two levels of search in Infinite Campus, the basic and advanced search.

BASIC SEARCH

The basic search is used to find a specific data type with limited or open criteria. To use a basic search, click on the Search tab in the Outline. Select the specific data type and enter the criteria in the search box (last name, first name). Click Go.

Wildcard searches can also be combined with a basic search.

The underscore (_) replaces one character. For example, when searching for Anderson/Andersen, use the _ to replace the o/e: Anders_n. The search will return matches for both Anderson and Andersen.

The percentage symbol (%) replaces multiple characters. It can be used for all - % alone, for after – b% returns all names whose last name begins with b, or for between b%n returns all names that begin with b and end with n. Searching with just a % symbol (or no entry) will return all results.

ADVANCED SEARCH

The advanced search combines a variety of data pieces to yield a more specific search result. To use the advanced search, click on the Search tab in the Outline, then click Advanced Search.

In addition to the Student Search filters there is a Saved Filter window which displays saved searches drawn from the Ad Hoc Filter tool and "State Published" reports created by OPI.

Note: Each AIM user can create their own Ad Hoc filters so the items displayed in the Saved Filter window will likely vary from one user to another.

The advanced search allows the user to combine a variety of data elements or Ad Hoc Reports into one search.

For example, to search for all ninth grade students who are male, select 09 from Grade and M from Gender. Click Search.

To use a saved filter, select the filter from the Saved Filter window. Click Search.

In the example below, the State Published Current LEP Students filter is selected.

The screenshot shows the 'Campus Search' window. On the left is the 'Student Search' section with input fields for Last Name, First Name, Student Number, SSN, Grade, Birth Date, Gender, StateID, Person ID, Locker Number, and Special Ed. Below these are dropdown menus for Status, Setting, and Disability, followed by a 'Search' button. On the right is the 'Saved Filter' list, which includes: Fall Absences, State Published, ADA - Days Present or Days Enrolled Is Null, CTE Concentrators, CTE Missing Post Grad Status or Date Contacted, District Edition - ADA Extract for Upload, EOY - Missing Enrollment End Date and Status, Fall Enrollment Records Used In Calculating ANB, Gifted and Talented, LEP - Current LEP students (highlighted), Missing Fall Aggregate Hours, Missing Winter Aggregate Hours, Spec Ed Status Fall Count - Locked, Spec Ed Status Fall Count - Unlocked, and Winter Enrollment Records Used In Calculating ANB.

To search for all current LEP students who are ninth grade males, select the Saved Filter, select 09 from Grade and M from Gender. Click Search (under Student Search).

This screenshot shows the same 'Campus Search' window, but with specific filters applied. In the 'Student Search' section, the 'Grade' dropdown is set to '09' and the 'Gender' dropdown is set to 'M'. The 'Saved Filter' list on the right remains the same, with 'LEP - Current LEP students' still highlighted. The 'Search' button is visible at the bottom of the Student Search section.

STUDENT INFORMATION



Student data is contained in three primary locations in Campus: the Summary tab, the Enrollment tab and the Demographics tab.

SUMMARY TAB

Path: Index/Student Information/General/Summary

The Summary tab contains read-only data about a student. The information included on the Summary tab includes Name, Gender, Race/Ethnicity, Birthdate, Student Number (local ID number), and State ID.

The screenshot shows the 'Summary' tab for a student named Darwin, Charles E. The interface includes a top navigation bar with tabs like 'Credit Summary', 'Assessment', 'Behavior', 'Graduation', 'AdHoc Letters', and 'Records Transfer'. Below this is a sub-navigation bar with 'Summary', 'Enrollments', 'Schedule', 'Attendance', 'Flags', 'Grades', and 'Transcript'. The 'Summary' tab is active, displaying a 'Person Summary Report' with various fields for personal information, including Name, Nickname, Gender, Race/Ethnicity, Birth Date, Student Number, State ID, and Person GUID. A 'Household ** Secondary' table is also visible at the bottom.

Household ** Secondary				
Name	Relationship	Enrollment (grade)	Phone(s)	Email

ENROLLMENT TAB

Path: Index/Student Information/General or Index/Census/People/Enrollments

The Enrollment tab contains information about a student's current and historical enrollment into a school and/or district. The basic elements of an enrollment record are the student's Start/End Dates, Start/End Status, Grade Level, and Service Type. These elements will be outlined in more detail in the next section.

Darwin, Charles E
 Grade: 12 #999100000 DOB: 01/01/1998 Gender: F

Credit Summary Assessment Behavior Graduation AdHoc Letters Records Transfer

Summary **Enrollments** Schedule Attendance Flags Grades Transcript

Print Enrollment History New New Enrollment History

Edit	Grade	Type	Calendar	Start Date	End Date
	11	P	14-15 Granite High School	08/27/2014	
Start Status: 02 Continued enrollment same school, no interruption End Status:					
	10	P	13-14 Granite High School	09/03/2013	05/31/2014
Start Status: 02 Continued enrollment same school, no interruption End Status: 100 End of year, returning to same school next year					
	09	P	12-13 Granite High School	09/04/2012	05/31/2013
Start Status: 02 Continued enrollment same school, no interruption End Status: 100 End of year, returning to same school next year					
	08	P	11-12 Phillipsburg 7-8	09/06/2011	05/25/2012
Start Status: 02 Continued enrollment same school, no interruption End Status: 110 Promoted to another school in the same district					
	07	P	10-11 Phillipsburg 7-8	09/01/2010	05/27/2011
Start Status: 04 Transfer from public school in district or state End Status: 100 End of year, returning to same school next year					

DEMOGRAPHICS TAB

Path: Index/Census/People/Demographics

The Demographics tab allows a user to correct a misspelled name, incorrect birthdate, Race/Ethnicity code, or Student Number (local ID).

NOTE: If a student changes their legal name (or it is discovered that the student is enrolled with a name other than their legal name) use the Identities tab to make those changes (see page 18).

Darwin, Charles E
 Grade: 10 #999100000 DOB: 01/01/1998 Gender: F

Demographics Identities Households Relationships Enrollments Distr

Save Delete Person Summary Report Demographics Data

Person Information

PersonID: 148

*Last Name: Darwin *First Name: Charles Middle Name: E.C. Suffix:

*Gender: Male *Birth Date (Age: 16): 01/01/1998 Soc Sec Number:

Race/Ethnicity (Edit)

State Race/Ethnicity:

Federal Designation: 6:White

Race(s): White

Hispanic/Latino: N:No

Race/Ethnicity Determination:

Date Entered US: Date Entered US School:

Date Entered State School:

Home Primary Language:

Language of Impact:

Nickname:

Comments:

Upload Picture

- Modified by: Administrator, System 08/11/2014 10:50



CREATING ENROLLMENTS

STUDENT LOCATOR METHOD

Path: Index/Student Information/Student Locator

The Student Locator is the preferred method for enrolling new students into AIM MT Edition. The Student Locator searches the state database for students previously enrolled in a Montana school district. Using the Student Locator decreases the chances of creating a duplicate State Student ID.

The student's Last Name, First Name and Gender are required for a search. A student should always be entered with their legal name. If a student has been previously enrolled in a Montana school district, but a match is not generated, try commonly used last names, nicknames, switch first and last names, or vary the gender. If a

match is still not generated, contact the OPI AIM Staff for assistance (1-877-4AIMMT1 or 1-877-424-6681).

Tips for Success:

- No periods on Jr and Sr suffixes.
- If the first name is two names (e.g., Mary Ann) try the combined name as well as the first name only under first name.

If a match is generated, verify the student's birthdate. Hovering over the student's name will show their last enrollment and grade level. If those match the enrolling student, click on the student's name. From the Student Information screen use the Direct Method (page 15) to create a new enrollment.

Student Locator

Student Search
Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search. The user must or click on Create New Student. When doing a SSN-only search, the user must still do a name based search before they are allowed to create a new per

Last Name:
 First Name:
 Gender:
 Birth Date:
 Middle Name:
 SSN #:
 State ID:

Name	State ID	Gender	Birth Date	%
Haggard, Merle	657371011	M	06/17/2001	100

Locally Enrolled Student, shortcut to their local records
 Last Enrolled: (08/29/2013-) in grade 07 Cascade Public
 Schools13-14 Cascade 7-8
 Guardian Names:

If the student has not been previously enrolled in a Montana school district, click Create New Student. A message will pop up, warning the user that this process will create a new State Student ID. Click OK.


Student Locator

Student Search
Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search. The user must enter the State ID, or click on Create New Student. When doing a SSN-only search, the user must still do a name based search before they are allowed to create a new person.

Last Name:
 First Name:
 Gender:
 Birth Date:
 Middle Name:
 SSN #:
 State ID:

Name	State ID	Gender	Birth Date	%
No matches found				

Message from webpage

 **WARNING:** This process will create a new State ID for the student in the MT state system.
 This should ONLY be used if the student has NEVER been enrolled in MT. Continue?

1. Person Info: Enter the Student Number (local ID) – *optional*. If this is a new student, the State ID will populate when the record is saved.

Person Info	
Student Number	2345 <input type="checkbox"/> Generate Number
State ID	Pending

2. Identity Info: Enter the required information (marked with a red asterisk (*)).

Identity Info			
*Last Name	*First Name	Middle Name	Suffix
Bradbury	Ray		
*Gender	*Birth Date	Soc Sec Number	
Male	10/10/1996		
Race/Ethnicity			
*Is the individual Hispanic/Latino?			
N: No			
*Is the individual from one or more of these races?			
(check all that apply)			
<input type="checkbox"/> American Indian or Alaska Native			
<input type="checkbox"/> Asian			
<input type="checkbox"/> Black or African American			
<input type="checkbox"/> Native Hawaiian or Other Pacific Islander			
<input checked="" type="checkbox"/> White			
Race/Ethnicity Determination			

3. Enrollment Detail: Enter the student's Start Date, Start Status and Grade.

Enrollment Detail			
*Calendar	*Schedule	*Grade	Class Rank Exclude
14-15 Granite High School	Main	11	<input type="checkbox"/>
*Start Date	No Show	End Date	*Service Type
08/25/2014	<input type="checkbox"/>		P: Primary
*Start Status	End Action		
06: Transfer from an out of state school			
End Status			
Dropout Reason			
Start Comments			
End Comments			

- Click Save to enroll the student. The Student Records Transfer wizard will appear. Click Submit Request. Records from the sending district will be automatically requested (this feature **does not** replace an official records transfer request from the district – only information contained in the sending district's database will be sent).

Student Records Transfer					
Request a Records Release					
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.					
Student:			Enrollment Type: Primary		
Last Name	Chesney	First Name	Kenny	Middle Name	
Gender	M	Birthdate	05/09/2004	SSN	
Grade	02	School	11-12 Cascade School 2	Start Date	08/31/2011
Requesting District & User					
District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	08/17/2011	Work Phone		Email	
Comments					
<input type="text"/>					
<input type="button" value="Submit Request"/>					

DIRECT ENTRY METHOD

Path: Index/Student Information/General

Students who were previously enrolled in a school of the district can be enrolled in the next year by opening the enrollment record from the previous year and using it to create an enrollment in the following year.

After pulling up a student's General Information screen (Search tab, enter last name, click Go), click the Enrollments tab. Change the Year to 14-15 and select a school. Click New. Enter the 14-15 *Start Date*, *Start Status*, *Grade Level* and *Comments* (if applicable). Click Save. If the student is transferring in from another district in the state of Montana, a records request will have to be initiated (see page 21).

RACE/ETHNICITY

Path: Index/Census/People/Demographics

Districts should encourage parents of students new to the district to provide accurate information on students' race and ethnicity. Parents also need to be made aware they have the right to refuse to answer the race and ethnicity questions, but a third party observer will then designate the student's race and ethnicity.

1. To enter or edit race and ethnicity information, locate the student's demographic information (Index/Census/People/Demographics). Next to the Race/Ethnicity section, click Edit.

Kaye, Danny D
Grade: 11 #999100008 DOB: 06/04/1996 Gender: M

Demographics | Identities | Households | Relationships | Enrollments

Save Delete Person Summary Report Demographics Data

Person Information
PersonID: 237
*Last Name: Kaye *First Name: Danny Middle Name: Dylan Suffix:
*Gender: Male *Birth Date (Age: 18): 06/04/1996 Soc Sec Number:
No Image Available

Race/Ethnicity (Edit)
State Race/Ethnicity:
Federal Designation: 5: Native Hawaiian or Other Pacific Islander
Race(s): Native Hawaiian or Other Pacific Islander
Hispanic/Latino: N: No
Race/Ethnicity Determination:

Kaye, Danny D
Grade: 11 #999100008 DOB: 06/04/1996 Gender: M

Demographics | Identities | Households | Relationships | Enrollments

Save Delete Person Summary Report Demographics Data

Person Information
PersonID: 237
*Last Name: Kaye *First Name: Danny Middle Name: Dylan Suffix:
*Gender: Male *Birth Date (Age: 18): 06/04/1996 Soc Sec Number:
No Image Available

Race/Ethnicity
*Is the individual Hispanic/Latino?
N: No
*Is the individual from one or more of these races?
(check all that apply)
☒ American Indian or Alaska Native
☐ Asian
☐ Black or African American
☐ Native Hawaiian or Other Pacific Islander
☐ White
Race/Ethnicity Determination:

2. Enter the appropriate Ethnicity and Race information. Both questions are required and multiple Races may be selected.

3. The Race/Ethnicity Determination field is optional. It may be used to track how a student's Race/Ethnicity was determined.

ENROLLMENT START AND END DATES

Path: Index/Student Information/General/Enrollments

The student's Start and End Dates are a reflection of the actual dates that a student attends a school. The Start Date is the student's first day of attendance (not necessarily the enrollment date). A student may enroll prior to the first day of enrollment. The End Date is the student's last day of attendance (not the date the records request is received). A student may leave a district for a period of time before a records request (or other notification that the student has exited) is received. Once the notification is received, the Student's End Date should be changed to reflect the last day of attendance.

Kaye, Danny D
Grade: 11 #999100006 DOB: 06/04/1996 Gender: M

Credit Summary Assessment Behavior Graduation AdHoc Letters Records

Summary **Enrollments** Schedule Attendance Flags Grades Trans

Print Enrollment History New New Enrollment History

Edit	Grade	Type	Calendar	Start Date	End Date
	12	P	14-15 Granite High School Start Status: 02 Continued enrollment same school, no interruption End Status:	08/27/2014	
	11	P	13-14 Granite High School Start Status: 02 Continued enrollment same school, no interruption End Status: 340 Unknown	09/03/2013	05/31/2014
	10	P	12-13 Granite High School Start Status: 02 Continued enrollment same school, no interruption End Status: 100 End of year, returning to same school next year	09/04/2012	05/31/2013
	09	P	11-12 Granite High School Start Status: 04 Transfer from public school in district or state End Status: 100 End of year, returning to same school next year	09/06/2011	05/31/2012
	08	P	10-11 Phillipsburg 7-8	09/01/2010	05/27/2011

ENROLLMENT START AND END STATUS CODES

Path: Index/Student Information/General/Enrollments

The student's Start and End Status codes are a reflection of where the student came from and where the student is going. For State reporting purposes, it is important that these codes be as accurate as possible.

See [Appendix A](#) for definitions of Enrollment Start Status codes.

See [Appendix B](#) for definitions of Enrollment End Status codes.

Kaye, Danny D
 Grade: 11 #999100006 DOB: 06/04/1996 Gender: M

Credit Summary Assessment Behavior Graduation AdHoc Letters Records Transfer

Summary **Enrollments** Schedule Attendance Flags Grades Transcript

Save Delete Print Enrollment History New New Enrollment History

Enrollment Editor

Edit	Grade	Type	Calendar	Start Date	End Date
	12	P	14-15 Granite High School	08/27/2014	
	11	P	13-14 Granite High School	09/03/2013	05/31/2014
	10	P	12-13 Granite High School	09/04/2012	05/31/2013
	09	P	11-12 Granite High School	09/06/2011	05/31/2012

General Enrollment Information

Calendar: 13-14 Granite High School Schedule (read only): Main

*Start Date: No Show End Date: End Action: *Grade: 11 Class Rank Exclude: ☐

*Service Type: P. Primary

End Status: 340: Unknown

Dropout Reason: 17: Unknown Reason

End Comments:

Next Calendar: Next Schedule Structure: Next Grade:

Kaye, Danny D
 Grade: 11 #999100006 DOB: 06/04/1996 Gender: M

Credit Summary Assessment Behavior Graduation

Summary **Enrollments** Schedule Attendance

Save Delete Print Enrollment History New

Enrollment Editor

Edit	Grade	Type	Calendar
	12	P	14-15 Granite High School
	11	P	13-14 Granite High School
	10	P	12-13 Granite High School
	09	P	11-12 Granite High School

General Enrollment Information

Calendar: 13-14 Granite High School Schedule (read only): Main

*Start Date: 09/03/2013 No Show End Date: 05/31/2014

*Start Status: 02: Continued enrollment same school, no interruption

Start Comments:

100: End of year, returning to same school next year
 105: Change in grade level during regular school year
 110: Promoted to another school in the same district
 120: Transfer to a public school in the same district
 130: Transfer to public schol under NCLB schol choice
 140: Transfer to public schol in another district in MT
 150: Transfer to a MT state-funded school
 160: Transfer to a private school in the state
 170: Transfer to a home school in the state
 180: Transfer to a school out of state
 190: Transfer out of the country
 210: Medical care or treatment, eligible to return
 220: Enrolled in a foreign exchange program
 230: Enrolled in an early admissions college program
 240: Withdrawn, under age for compulsory school att
 250: Expelled, eligible to return
 260: Unknown (grades PK-6)
 295: Dropped out, subsequent re-enrollment
 300: Withdrew for personal or academic reasons
 310: Exceeded age requirement set by district policy
 320: Removed or Expelled, without option to return
 330: Withdrew to enroll in non-diploma program
 340: Unknown
 400: Graduated
 420: Completed school with other credentials
 500: Student died
 510: Student is permanently incapacitated

SERVICE TYPE

Path: Index/Student Information/General/Enrollments

The Service Type is a partial indicator of a student's enrollment status. There are three choices for Service Type:

1. P: Primary – the Primary Service Type indicates that the student is primarily enrolled in this school or district for educational services.
2. S: Partial – the Partial Service Type indicates that the student is enrolled primarily at another school or district, but receives some educational services from this school or district. (e.g., a home school student who takes a math class at the local high school or an 8th grade student with a primary enrollment at the middle school but taking a math class at the high school).
3. N: Special Ed Services – the Special Ed Services Service Type indicates that the only services a student receives from the school or district is Special Education services. This Service Type applies to students who receive their educational services from another type of school (e.g., home school or private school), but comes to the school or district for Special Education services. This Service Type applies most often to Pre-Kindergarten students who receive Special Education services (including speech).

A student may have a Primary enrollment at one school and a Secondary or Special Ed enrollment in another. However, a student can **never** have two primary enrollments with overlapping dates.

In this example a student has a Primary enrollment in the eighth grade at the middle school and is also taking an advanced class at the high school. The enrollment at the high school has a Service Type of S: Partial and is listed as a ninth grade enrollment (because this high school does not include the eighth grade level).

Knievel, Evel
Grade: 09 DOB: 09/09/2003 Gender: M

Credit Summary Assessment Behavior Graduation AdHoc Letters Rec

Summary **Enrollments** Schedule Attendance Flags Grades Tra

Print Enrollment History New New Enrollment History

Edit	Grade	Type	Calendar	Start Date	End Date
	09	S	14-15 Granite High School	08/27/2014	
Start Status: 02 Continued enrollment same school, no Interruption Attends majority of day at 7-8 school					
End Status:					
	08	P	14-15 Phillipsburg 7-8	08/26/2014	
Start Status: 02 Continued enrollment same school, no Interruption					
End Status:					

In this example a student is enrolled in a home school and is taking a speech class at the local high school. Because the student is receiving only Special Ed services from the public school his Service Type is N: Special Ed. A note has been added to the student's Start Comments explaining the situation.

Bell, Alexander G
#5678 DOB: 10/10/1996 Gender: M

Credit Summary Assessment Behavior Graduation AdHoc Letters Record

Summary **Enrollments** Schedule Attendance Flags Grades Trans

Print Enrollment History New New Enrollment History

Enrollment Editor

Edit	Grade	Type	Calendar	Start Date	End Date
	09	N	14-15 Granite High School	08/24/2014	

Start Status: 00 Transfer from home school within the state Speech services only.

End Status:

LEGAL NAMES/NAME CHANGES

Path: Index/Census/People/Identities

The AIM system is designed so that each student has only one State Student ID that stays with a student from the first enrollment into public school through graduation from high school. To prevent duplication, it is highly recommended that legal names are used in AIM. The AIM system allows multiple identities to be attached to a single State Student ID, to accommodate necessary legal name changes.

Bell, Alexander G
#5678 DOB: 10/10/1996 Gender: M

Demographics **Identities** Households Relationships Enrollments

Save Delete New

Identities Editor

Identity	Current	Effective Date	Birth Date	District
Bell, Alexander G	X	08/11/2014	10/10/1996	Phillipsburg K-12 Schools

Identity Information

PersonID: 580

*Last Name: Bell *First Name: Alexandre Middle Name: Graham Suffix:

*Gender: Male *Birth Date (Age: 17): 10/10/1996 Soc Sec Number:

Race/Ethnicity (Edit): State Race/Ethnicity: Federal Designation: 3:Asian

No Image Available

Simple corrections of typographic errors in the student's name or changes to the student's birthdate, race/ethnicity, and gender should be made on the Demographics tab.

However, if a student's legal name changed or if the student was entered with a name that is not the legal name, create a new identity on the Identities tab.

On the Identities tab, click New. Change the student's name. Click Save. The student's records will be attached to this name with a historical tie to the previous name.

RECORDS TRANSFER



The Records Transfer tool in the AIM MT Edition is used mainly to facilitate the transfer of Special Education records. The Records Transfer tool can also be used to reconcile enrollment overlaps and provide student transfer information such as LEP data.

When a student that is new to the district is enrolled using the Student Locator, the Records Transfer Wizard opens automatically to generate a request immediately. If a student is enrolled using the direct entry method, the administrator must manually generate a Records Transfer request. The next sections explain how to enter a manual Records Transfer request and view the status of all requests.

PROCESS INBOX

The Process Inbox allows a user to view the status of each Records Transfer request made through AIM.

The Process Inbox is located on the user's main page. To access the Process Inbox, click on the user's name on the Index tab. Use the pull-down menu to select Records Transfer. Click Find Messages.

	Process	Name	Posted Date	Due Date
<input type="checkbox"/>	Records Transfer	Transfer Error: Huxtable, Theodore 100966093	08/07/2014	
<input type="checkbox"/>	Records Transfer	Transfer Released: Knlevel, Evel 419339261	06/19/2014	
<input type="checkbox"/>	Records Transfer	Transfer Released: Zorro, Jim 399621145	06/19/2014	

The list shows the current status of all records transfer requests. Click a message to open the record and view details. Details look like this:

Student Records Transfer

Records Release
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

Records Transfer Zorro, Jim #

Student: Enrollment Type: Primary

Last Name	Zorro	First Name	Jim	Middle Name	
Gender	M	Birthdate	01/01/2000	SSN	
Grade	06	School	12-13 Cascade School	Start Date	01/24/2013

Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	06/18/2014	Work Phone		Email	
Comments	None.				

Releasing District & User

District	0556 Phillipsburg K-12 Schools	Name	System Administrator	Username	support
Release Date	06/19/2014	Work Phone		Email	
Comments	None.				

RECORDS TRANSFER TAB

Path: Search/Student/(enter student name and click Go)/Records Transfer

On the enrollment record for a particular student, the Records Transfer tab contains information about all pending and completed transfer requests.

The Transfers section shows the Request Date, the student's name, Status, Requesting District and Releasing District. Open the record by clicking on the student's name. The detail screen is shown below.

Huxtable, Vanessa
Grade: 07 DOB: 07/24/2002 Gender: F

Summary	Enrollments	Schedule	Attendance	Flags	Grades	Transcript
Credit Summary	Assessment	Behavior	Graduation	AdHoc Letters	Records Transfer	

[New State Transfer Request](#)

Request Date	Name	Status	Requesting District	Releasing District
08/13/2014	Huxtable, Vanessa	request	Cascade Public Schools	

Records Transfer Huxtable, Vanessa #
This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

Student: Enrollment Type: Primary

Last Name	Huxtable	First Name	Vanessa	Middle Name	
Gender	F	Birthdate	07/24/2002	SSN	
Grade	07	School	14-15 Cascade 7-8	Start Date	06/23/2014

Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	08/13/2014	Work Phone		Email	
Comments	None.				

Status: Waiting for former district to release records.

To manually request records from a student's former district, click New State Transfer Request.

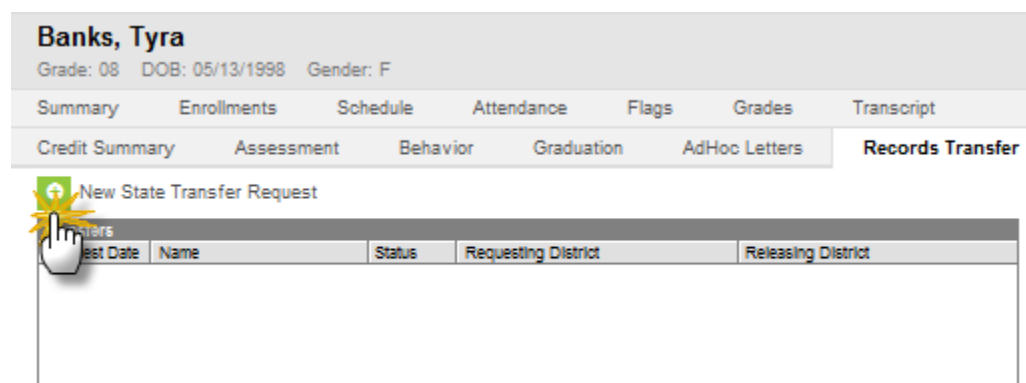
NOTE: When a student who has never been enrolled in the district is entered using the Student Locator, this step is not necessary as a records request will be sent automatically (see page 14). If the student was previously enrolled in the district at any time, the screen will not automatically produce a records request, so it must be manually entered.

PROCESSING REQUESTS

Transfer into a District - Entering a Records Transfer Request


If the student is enrolled using the direct entry method - OR - if the student was entered using the Student Locator but was previously enrolled in the district at some time in the past, the district must manually enter a records request.

To enter a manual records request, enter the Year and School. From the Search tab, enter the student's last name and click Go. The student's enrollment record opens. Click the Records Transfer tab and click New State Transfer Request.



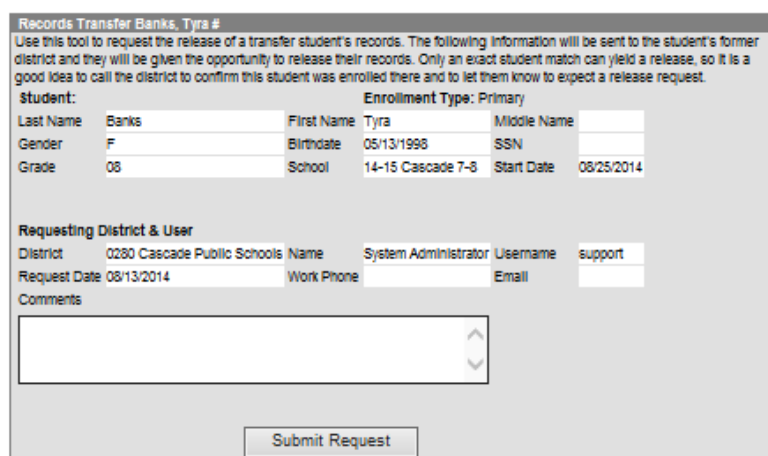
Banks, Tyra
Grade: 08 DOB: 05/13/1998 Gender: F

Summary Enrollments Schedule Attendance Flags Grades Transcript
Credit Summary Assessment Behavior Graduation AdHoc Letters **Records Transfer**

 New State Transfer Request

Request Date	Name	Status	Requesting District	Releasing District

Click Submit Request to initiate a transfer request. The status of a request can be verified on the Process Inbox or in the Records Transfer tab of the student's record.



Records Transfer Banks, Tyra #

Use this tool to request the release of a transfer student's records. The following information will be sent to the student's former district and they will be given the opportunity to release their records. Only an exact student match can yield a release, so it is a good idea to call the district to confirm this student was enrolled there and to let them know to expect a release request.

Student: Enrollment Type: Primary

Last Name	Banks	First Name	Tyra	Middle Name	
Gender	F	Birthdate	05/13/1998	SSN	
Grade	08	School	14-15 Cascade 7-8	Start Date	08/25/2014

Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	08/13/2014	Work Phone		Email	

Comments

AIM processes the request and gathers records from the previous school district. Once the record has been processed by the former district, a "Transfer Released" message will appear in the Process Inbox or on the student's Records Transfer tab. Click on the student's name. A list of available documents and imports will be listed below the transfer information.

Student Records Transfer

Records Release
This is a Records Release containing the student information, the requesting district/user and the releasing district

Records Transfer Knlevel, Evel #

Student: Enrollment Type: Primary

Last Name	Knlevel	First Name	Evel	Middle Name	
Gender	M	Birthdate	09/09/2003	SSN	
Grade	09	School	13-14 Cascade High School	Start Date	01/13/2014



































Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	01/13/2014	Work Phone		Email	
Comments None					

Releasing District & User

District	0556 Phillipsburg K-12 Schools	Name	System Administrator	Username	support
Release Date	01/13/2014	Work Phone		Email	
Comments None					

Status: Records released.

<p>Transfer Documents</p> <ul style="list-style-type: none">  Transcript  Census Contact Summary  Extended-Genous-Summary  Enrollment History  Schedule  Attendance Period Detail  Assessment Summary  Behavior Summary  Health Condition Summary  Health Screening Summary  Health Immunization Summary 	<ul style="list-style-type: none">  IEP  MT Supplemental  Special Ed Evaluation  IEP Documents  PLP  PLP Documents  LEP  LEP Services  LEP Accommodations 	<p>Data imports</p> <ul style="list-style-type: none">  Transcript Import Wizard  Extended-Genous Import Wizard  Enrollment History Import Wizard  Assessment Import Wizard  Immunization Import Wizard  Health Condition Import Wizard  Health Screening Import Wizard  IEP Import Wizard  MT Supplemental Documents Import Wizard  Special Ed Evaluation Import Wizard  Special Ed Documents Import Wizard  PLP Import Wizard  PLP Documents Import Wizard  LEP Import Wizard
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Transfer Documents are PDF records that can be printed and added to a student's paper file. Data Imports are wizards that import data directly into the district's AIM MT Edition database.

To open a document or activate a wizard, click on the link. Documents that are not available for import will be listed in strikethrough text.

Kniesel, Evel
 DOB: 09/09/2003 Gender: M

Credit Summary Assessment Behavior Graduation AdHoc Letters Records

Summary **Enrollments** Schedule Attendance Flags Grades Transfers

Print Enrollment History New New Enrollment History

Edit	Grade	Type	Calendar	Start Date	End Date
	09	P	13-14 Cascade High School	01/13/2014	
Start Status: 04 Transfer from public school in district or state End Status:					
	10	P	Phillipsburg K-12 Schools 13-14 Granite High School	09/01/2013	
Start Status: 02 Continued enrollment same school, no interruption End Status:					

To import a student's enrollment history, click the Data Import called Enrollment History Import Wizard. The Wizard will display the student's enrollment history in the releasing district. Click Save to import the data. The enrollment history record will now display in the new district's database.

Transfer out of District

When a student transfers out of the district, a transfer message will be generated by the new district when they enroll the student. (Using the Student Locator, the message was generated automatically; using the direct entry method, the district must have entered a transfer request manually.)

The message "Request for you to release:" will appear in the Process Inbox (or click on the student's Records Transfer tab). Click on the underlined link to open the request.

Process Inbox

Date Range: to Display: All Processes

<input type="checkbox"/>		Process	Name	Posted Date	Due Date
<input type="checkbox"/>		Records Transfer	Transfer Complete: Chesney, Kenny 368555522	08/17/2011	
<input type="checkbox"/>		Records Transfer	Request for you to release: Mouse, Minnie 567881540	08/05/2011	
<input type="checkbox"/>		Records Transfer	Request for you to release: Church, Eric 662880660	08/01/2011	

There are three options on the Student Records Transfer.

1. **Release records** – an acknowledgement that this student has left the district and enrolled into the receiving district. The records in the database will transfer to the new school.
2. **Reject Request** – this should only be used if the student has not actually left the district or if there is a legal reason to withhold the records. In the case of common names, the new district may have accidentally enrolled the wrong student. Please call the receiving district or the OPI AIM Staff to resolve the overlap.
3. **Ignore Request** – this should never be used. If there is not time to process the request, click on another module or tool in the application and come back to it later. The request may contain important information that the receiving district needs for the student.

END DATES AND OVERLAPS

The Records Transfer tool can aid in reconciling enrollment overlaps. When a student transfers to a new district, the transfer request shows the student's Start Date in the new district. If there is an overlap in enrollment, the Records Transfer request will appear with a warning.

Student Records Transfer

Release or Reject a Request for Transfer Records
An external district is requesting the release of your district's records of a student. The request has come in through the Infinite Records Exchange and so the student has been enrolled in the new district, so please help to prevent incorrect data or enrollment overlaps.

Infinite Campus verifies that the requesting district is whom they say they are, and that the user making the request has been authenticated and authorized to make the request below. You may accept or reject this request, but you are encouraged to call the requesting district to verify the user's identity.

Records Transfer Church, Eric #

Student:		Enrollment Type: Primary	
Last Name	Church	First Name	Eric
Gender	M	Middle Name	
Birthdate	07/24/2002	SSN	
Grade	04	School	11-12 Cascade School
		Start Date	08/31/2011
		Overlap (08/31/2011-06/30/2012) 11-12 Philipsburg School Grade: 04	

Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	admin1
Request Date	08/01/2011	Work Phone		Email	
Comments					
None.					

Releasing District & User

District	0556 Philipsburg K-12 Schools	Name	System Administrator	Username	admin1
Release Date	08/17/2011	Work Phone		Email	
Comments					

Click Edit to return to the Enrollments tab and correct the error. Once the enrollment overlap has been fixed, return to the Process Inbox or Records Transfer tab and complete the records transfer.

The End Date for a student should always be the last date the student was in attendance at a school, not the date the records request is received. If a student leaves without notice a school may carry the student according to district policy. Once the student has been located (either receives a Records Transfer request in AIM, a records request from the receiving district, notice from OPI, the parent or another reliable source), enter the End Date as of the last day of actual attendance (if the district has already ended the student's enrollment according to district policy, the End Date may need to be changed to reflect the student's last day of actual attendance).

DATA VERIFICATION



Using the appropriate data verification tools ensures that the data entered is accurate. Inaccurate data can result in missed financial payments, missing assessment labels and/or incorrect AYP calculations. AIM data is used for public reporting of school information and in making policy decisions at the state and federal levels. The data is also posted on the OPI GEMS website.

Student Enrollment Status

This report lists students' enrollment start/end status and mailing address. The default calendar year is the current selected calendar.

Which students would you like to include in the report?

☒ Grade ☐ Ad Hoc Filter

Which calendar(s) would you like to include in the report?

☐ active year ☐ list by school ☒ list by year

Enrollment Add Date: From [] To []

Enrollment Drop Date: From [] To []

Display Options: ☒ Start Date ☒ End Date

How would you like the report sorted?

☒ Alpha ☐ Grade ☐ Student Number

Which enrollment status would you like to include in the report?

Start Status

End Status

☐ Print in HTML format

Generate Report

STUDENT INFORMATION REPORTS

Path: Index/Student Information/Reports

Enrollment Status

The Student Enrollment Status report is a student level report that can filter by Year, Grade, Start/End Date and/or Start/End Status. Select the criteria and click Generate Report.

Enrollment Summary Report

This report will list a breakdown of enrollments grouped by school, grade, gender and race/ethnicity. The report can be generated using Federal Race/Ethnicity designations or State Race/Ethnicity values. If your state has many different values for Race/Ethnicity, the Tall report format is recommended. Students with enrollments flagged as "No Show" are not included in this report.

Enrollment Effective Date: 08/31/2011

Which schools would you like to include in the report?

Which Race/Ethnicity values would you like to use?

☒ Federal Race/Ethnicity Values ☐ State Race/Ethnicity Values

How would you like to format the report?

☒ Original Format: Race/Ethnicities across the top and Grade Levels vertically ☐ Tall Format: Grade Levels across the top and Race/Ethnicities vertically

What types of enrollments would you like to include in the report?

☒ P:Primary ☒ S:Partial ☒ N:Special Ed Services

Report Options:

☐ Observe State Exclude (Do not include enrollments marked as state exclude)

Enrollment Summary Report

The Enrollment Summary Report is an aggregate report that shows the number of students by grade, gender and ethnicity as of a specified date. The reporting options on this report are more limited.

AD HOC REPORTS

Path: Index/Ad Hoc Reporting/Filter Designer

Ad Hoc reports are custom reports that are built by the user or the State and are used to verify/view data. A variety of filter options can be added to narrow down the search criteria. And a variety of formats are available for printing or sorting.

Refer to the following guides for further instruction on Ad Hoc Reporting:

[AD Hoc Reporting](#)

[State Published Ad Hoc Reports](#)

NOTE: To view a list of useful reports that were prepared and saved for district use by the OPI, expand State Published in the Saved Filters box.

MT EXTRACTS


Path: Index/MT State Reporting/MT Extracts

Use MT Extracts to verify a specific type of data that has been entered into the MT Edition of AIM. From Index, expand MT State Reporting and select MT Extracts. Choose the Extract Type, the Format and the Year(s)/School(s). Click Generate Extract. The extract will open in a new window in the format selected.

The screenshot shows the 'MT State Extracts' tool interface. At the top, a blue header bar contains the text 'MT State Extracts'. Below this, a grey box contains the following text: 'This tool will extract data to complete several formats of the MT State-defined reporting formats. Choose the State file in the state defined tab separated file format, otherwise choose one of the testing/debugging formats.' The interface is divided into two main sections. The left section, titled 'Extract Options', contains two dropdown menus: 'Extract Type' (set to 'Student Demographics') and 'Format' (set to 'State Format(TSV)'). Below these is a 'Generate Extract' button. The right section, titled 'Select Calendars', contains the text 'Which calendar(s) would you like to include in the report?' and three radio buttons: 'active year' (selected), 'list by school', and 'list by year'. Below the radio buttons is a list box showing the following items: '13-14', '13-14 Granite High School', '13-14 Phillipsburg 7-8', and '13-14 Phillipsburg School'.

ADDITIONAL REFERENCE GUIDES

The AIM website at <http://opi.mt.gov/Reports&Data/AIM/> contains numerous reference guides, including a guide specifically covering each data collection during the year.



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Denise Juneau, State Superintendent
opi.mt.gov


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Achievement in Montana (AIM)

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[BEGINNING OF YEAR VERIFICATION AND ENROLLMENT COLLECTION](#)
[FALL COUNT – ENROLLMENT, AGGREGATE HOURS & COUNT DATE ABSENCE COLLECTION](#)
FALL PROGRAM PARTICIPATION COLLECTION

- [FRAM Direct Entry or File Upload](#)
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[END OF YEAR ENROLLMENT & ADA COLLECTION](#)
[END OF YEAR PROGRAM PARTICIPATION COLLECTION](#)

OPI AIM HELPDESK

General AIM questions, collections, data elements, functionality	Special Ed Module
<p><u>AIM Help Desk</u></p> <ul style="list-style-type: none"> • 1-877-424-6681 • 406-444-3800 • email opiainhelp@mt.gov <p>Candi Standall – <i>AIM Student Records Specialist</i></p> <p>Buddy Hanrahan – <i>AIM Student Records Specialist</i></p> <p>Andy Boehm – <i>Graduate and Dropout Data Specialist</i></p> <p>Eric Meredith – <i>LEP Data Specialist</i></p>	<p>Technical assistance with functionality</p> <ul style="list-style-type: none"> • Mary Graff - 406-444-0685 • Anne Rainey - 406-444-4430 <p>Policy questions regarding completion of forms, contact one of the School Improvement Compliance Monitors</p> <ul style="list-style-type: none"> • Dale Kimmet - 406-444-0742 • Danni McCarthy - 406-444-0452 • Marla Swanby - 406-444-0044 • Francisco Román - 406-444-4426